



State of Montana Project Management Office

Project Execution and Approval Phase

Milestone Table with Driver Tasks

Formats for a milestone table including not only the completion dates for each critical milestone, but also a place to indicate the status of major driving tasks for each milestone. The second format included in this file also includes a column for indicating the “completion criteria and success factors” for the milestone.

For those running small projects—You can even use Format 1 to serve as your “work breakdown” and associated milestones, so that this is both a planning and tracking tool.

Milestone tables are an excellent way to communicate high-level project goals and overall project progress (or issues, if milestone dates are not being met). To get the most accurate reading of the progress to each milestone, though, the team must understand what key activities must be completed for the milestone to be achieved. This table provides a format for keeping those driving tasks highly visible and related to the milestones.

The purpose of the completion criteria and success factors in the second format is to make sure everyone on the team understands what it takes for a driving task to be completed and its outcome to be successful, and for the overall milestone to be successful.

A side benefit of this type of table is that it is very useful for teams who want to use streamlined, “low deliverable count” project planning and tracking. (For example, smaller teams, or those working in a highly iterative and/or in an informal environment, where a detailed, integrated schedule is not necessarily used each week.) These milestone table formats can be a primary vehicle for communication about project tasks. We recommend the second format for those situations, since it provides a place for the team to be very specific about completion and success.

This table is created during the planning of the project, and used and updated throughout the project for tracking and communication.

1. **Identify key high-level milestones:** As you plan the project, identify key milestones the team should track.
 - Some will be the actual “business milestones” driving the project schedule – for instance, needed delivery dates to particular customers or users; demonstration at a trade show; etc.
 - Others will be key “internal” milestones that are critical points of progress – for instance, the point at which the project’s deliverables are in a form that can be reviewed or tested by users/customers.

2. **Identify driving Tasks:** For each milestone that will be tracked, identify the key driving tasks/groups of tasks that must be done for the milestone to be achieved. Add those to the table, along with a designated lead or owner.
3. **Define completion criteria and success factors:** If you have chosen the second Milestone Table format in this file, fill in the column for completion criteria and success factors. See the example table for example entries.
4. **Save the “baseline” or original dates:** Record the baseline scheduled date for each milestone. This will come from your detailed planning and scheduling activities.

How to use:

1. **Update the table prior to each team meeting.** Get status information on each driving task from each lead/owner ahead of a team meeting.
2. **Look for problems:** Determine from that status whether a milestone appears to be in jeopardy. Include a revised date in the “current projected date” column if necessary.
3. **Use the table in each team meeting, to quickly review status against milestones.** Bring an updated table to the team meeting. Go down the milestone list, at least for those coming in the near term, or those farther out for which driving tasks have already started. Each person listed as responsible for a driving task should quickly explain its status and whether they believe the milestone is on target or threatened. Discuss any changes the project manager has made to the “projected completion date” for that milestone, and why.
4. **Clarify completion and success criteria:** As you review milestones and their driving tasks, make sure that everyone is speaking from the same definition of what it means for that task or milestone to be complete, and successful.
5. **Determine actions the team needs to take,** if any, to get the milestone back on track.
6. **Determine whether the schedule baseline should change.** At some point, the team may decide that the schedule has to be baselined again—in effect, the project is being rescheduled.
 - This should generally only be done if major issues have been encountered and significant re-planning has to occur.
 - In this case, the “baseline” column would be updated to a new baseline level, and the new baseline dates recorded.
 - A baseline change should not be done without serious consideration—that would undermine the value of identifying and tracking critical milestones.

- If a baseline change does become necessary, record the reason for the change in a “Baseline History” section after the table itself.

Administrative Information

Revision	Author	Date	Sections Affected	Change Summary
1.0		1/3/2009		

Current Version	1.0
Date	1/3/2009
Master Document Chapter Number	5
Document ID	150